

Digital Marketing Self-Assessment

Measuring Your Use of Digital Marketing Technology

- Self Assessment Process
- Analysis of Five Distinct Digital Marketing Aspects
- Team Alignment Exercise for Establishing Current State and Goals
- Building a Culture of Continuous Improvement

Overview



Measurement is one of the most critical steps to success. What gets measured gets done. Most companies have only a vague understanding of where they are with technology performance. This assessment and the corresponding team alignment process will leave you with a set of agreed upon scores for the state of your technology across a range of critical areas. You will also set goals for each area. Together, the agreed upon scores and goals will leave you with a gap analysis of how your strategy is performing at the moment, and how far you are from reaching your ideal state. Going through this process each year (or as often as you see fit) will show your progress and will also identify areas where you're not making progress, or where progress is slower. This is one key insight leaders need to make good decisions about focusing resources and budgets to see improvement. We want to help you get in the habit of continuous improvement, and consistent measurement is an essential component that helps make improvement more likely.

To provide a holistic view of your Digital Marketing strategy and performance, we've divided our Self Assessment into five categories that follow our Digital Marketing Model. Here are the five categories and descriptions of each:

1) Digital Marketing Fundamentals and Humalogy (DMFH)

//In this section you will score elements of your organization that are fundamental to making holistic progress with Digital Marketing, it also introduces FPOV's Digital Marketing Model by evaluating your effectiveness with Humalogy//

Digital technology is altering how people engage one another; form, maintain, and grow relationships; communicate, research needs, and make decisions. It is changing the face of business and what your company must do in order to build upon your past success as well as



remain relevant in the future. This section focuses on establishing a baseline with regards to how well you are using available Digital Marketing technologies and strategies; identifying areas for improvement and underlying adoption challenges you may have, and empowering you with the ability to measure your progress with using these tools over time.

When connecting with prospects and customers we have a choice in how we deliver information and allow them to reach out to us. We can do this with text, video, pictures, audio and each one produces a different “feel.” We must learn to blend technology with people in the most appropriate ways. We call this “Humalogy” because it signifies the perfect blending of humans and technology. There are things that technology does better than people, and there are other things that people do better than technology. We must be able to use technology to have a more human connection with our constituents.

2) Content and Connection (CON)

//In this section you will score your performance as it relates to the content you are using to connect with customers and then how you’re using that connection to build closer relationships with them.//

Content and connection are the two foundational concepts for marketing experiences today. Content must deliver valuable information, and connection delivers an emotion. Content delivers information about your brand, products, people, or performance. People are inundated with content today so yours must be compelling and provide value to your Constituent. Also, as an organization, you must use marketing to generate the emotion you want from Constituents when you want it and translate this into how the person feels about your brand.

3) Inbound and Outreach (IOM)

//This section assesses your Inbound and Outreach Marketing capabilities holistically. There are a number of processes you should have in place to stay ahead of your competitors with this increasingly important set of Digital Marketing tools//

Inbound marketing creates the environment for prospects to find you (“findability”), then establishes a powerful online presence so that people choose to take the next steps to engage with you. Outreach Marketing is the ability to proactively find prospects using a campaign-based strategy that pushes out incentives for people to connect based on their desire to receive some real or perceived value.

4) Data and Customer Intelligence (DCI)

//This section will evaluate how strong your organization is in gathering and using data, turning it into customer intelligence, and then using that to deepen your relationships//

Once you have a connection with a customer, or information on a prospect, you must have tools and strategies for expanding and deepening the relationship. In the best-case scenario, this is automated to some extent so you are not dependent on humans to do all of this work. Whoever knows more about their Constituents will have the best chance to win in the market!

5) Digital Marketing Measurements and Analytics (DMMA)

//This section assesses how well you are utilizing Digital Marketing measurements tools//

What gets measured gets done, and also has the chance to be improved. Digital Marketing provides a high degree of measurability and you must invest the time to maximize your ability to test ideas, and then make incremental improvements based on the results you are able to see. There is no reason to fly blind with marketing now.

Goals



There are three main goals for this process. The first goal is to establish a current-state ranking for each of the statements and categories. Secondly, every organization should establish goals of where they would like for their scores to be based on their guideposts, strategy, and budget. Knowing and agreeing on these two positions (current state and goals) is an important part of making progress. When established, they will help your team identify specific areas and projects to work on over the next year. Goals should be set for two years. One-year goals identify the projects you NEED to accomplish over the next year, and two-year goals are the objectives that you WANT to accomplish over the next two years. Each year these needs and wants you're focusing on should be reevaluated. Finally, the third goal is creating team agreement on the current-state scores and goals that result from this process. When everyone is in agreement, it will help your culture prepare for the hard work and progress that you are about to commit to.

Process Description



This scoring system has been designed to create an organized grading scale for looking at Digital Marketing as a performance center within the organization. In order to make progress as an organization, you must move beyond opinions and develop a common understanding of "truth." Once there is an agreed upon "truth" as to what current state really is, you can then establish goals for making improvements. When you have a comprehensive and integrated approach, Digital Marketing can become a machine that you can calibrate to drive a predictable

stream of revenue. The act of completing the assessment, and then discussing the results as a team will begin to build the collective "muscle" inside your organization.



Here are our basic steps to the self assessment process:



1) Gather a Team

The size and composition of your team will depend on the size of your organization. This team should be anywhere from three to ten people and it should be a good mix of managers and employees, as well as a collection of the different roles that make up your Digital Marketing team. For a small business that could mean the team includes the owner, the person handling marketing, and an employee or two that are active in the business' marketing efforts. For a large organization this team could include the CMO, a VP from the marketing department, and a mix of several employees and managers from across the marketing department or entire organization.

Bring these people together and explain that they've been chose to study the organization's Digital Marketing performance and help improve it. Explain the process as listed in the steps described in this section. Then set a firm deadline to complete their assessment by, explain how to access it, and provide the date and time for their Team Alignment Meeting.

2) Individually Complete Assessments

Each team member will go through the Digital Marketing Self Assessment individually. It is important that they score each statement honestly and independently. The entire list of statements is included in the "Supporting Documents" section below. Have them record their scores in a way that they can easily bring to discuss in the Team Alignment Meeting that follows.

Assessment participants will score each of the statements on a scale of 1 - 6 based on where



they believe the organization is compared to where it be should in terms of technology strategy:

1 - Way Behind

2 - Somewhat Behind

3 - Average

4 - Somewhat Ahead

5 - Well Ahead

6 - Dominant

A score of "0" means that the assessment taker does not know, or the statement is not applicable to their area of focus.

3) Team Alignment Meeting - Scores and Goals

Bring the team together that has just completed the assessment independently. The purpose of this meeting is to agree on scores for each of the statements through discussion. It's important that everyone has their scores and is ready to discuss their reasoning behind the scoring. This is where you see the value of having a team comprised of diverse responsibilities within the marketing effort; each of them has a different perspective on the scoring for each statement. For example, consider the following statement:

"We have a defined set of social tools that we use and are well trained in leveraging them."

This statement could receive a wide range of scores. Your employee managing social accounts might give a high score here of a "5" because they know that the organization is using several different social channels to reach their constituents, and they feel like they are using them well. However, an operations manager might provide a much lower score of "2" just because of



encourage it. That added discussion will only help your team.

4) Goal Setting

This can be done at the Team Alignment Meeting, or in a separate meeting that follows. The important piece is that the goals should be set by individuals who have control over the organization's overall strategy and budget. The goals should align with the organization's strategy and budget. It may be necessary to take some time after the team alignment meeting to review the agreed upon scores and do some critical thinking about which areas make the most sense to focus on over the next year, and that is fine.

When setting goals remember to set year-one goals that you NEED to accomplish in the next year, and year-two goals that you WANT to accomplish. Each year, as you complete the assessment again, these goals should be reevaluated to so that you can adjust your year-one NEEDS and year-two WANTS. This rolling strategy is a great way to continually improve.

One important piece to remember is that the goal of this self assessment process is not to achieve the score of a "6" for every statement. Sure, that would be great, but realistically not every statement applies to or is a critical part of every organization's strategy. The purpose of this exercise is to agree on where your organization currently is, where your IDEAL state of performance is. Too much effort on pieces that aren't critical can lead to wasted time and investment. With that being said, imagine what your ideal state would be, and then set realistic one-year and two-year goals that would lead you toward your ideal state.

5) Improvement Project Assignment

Once leaders have set the year-one and year-two goals. It's time to pick out the areas that you



will focus on improving over the next twelve months. Pick some of the most important areas covered as they pertain to your strategy, assign project owners to devise a strategy for improvement, have them bring their proposals back to managers for approval, and then assign the owners to implement the project to completion. It is important that each of these projects has a specific owner (one individual) so they they will apply the necessary focus to make sure the project gets done. Some of these projects may require a monetary investment, other may just require a time investment (e.g., writing and filing processes that are missing from your organization). Somewhere around ten improvement projects is a good number of areas to focus on for the year, however this can fluctuate based on the size of the organization, the effort that selected projects will take, or how far behind your Digital Marketing performance is. If you finish projects earlier than expected, try incorporating other projects into the year that help you reach your one-year and two-year goals.

6) Reassess

Once you get to the end of the year, it's time to evaluate the progress made, go through the self assessment process again, reassess one-year and two-year goals, and then assign new projects for the upcoming year.

Begin with evaluating the progress you made. Did you complete all of your projects for the year; if not, why? For the projects that you completed, what improvement have they provided? It's important to showcase the progress made and how it has helped your overall strategy. Also, point out those team members that led the successful projects and reward them when they've done well. Announce those rewards broadly, and make it clear to your team that you are going to reward people who work hard to help the company make progress toward its overall strategy.



After evaluating and showcasing the progress that you've made, it's time to start the self assessment process again. Begin with step one of this process; gather your team and begin working through these steps again. You can use the same team or make changes to it, but the important part is to go through each of these steps as an organization every year. This is the path toward continual improvement. This process is not extremely difficult, but it does require dedication, focus, and leadership.

Expected Outcomes

The overarching outcome produced by this process is cultivating a culture of continuous improvement. This is done through measurement, goal setting, and incremental progress. The first year is always the hardest; scoring is more difficult because you don't have a comparison to look back at, setting goals can be tough because you may not have ever taken on this kind of a challenge so are unsure as to how much you can really accomplish, and completing projects isn't easy at first because it seems like "extra" work and your employees may not have seen you express your appreciation for making progress toward the organization's goals and strategy. After making it through one year, the process becomes much easier until eventually it becomes part of the fabric of your organization - where it is no longer "extra" work, but simply the way that your organization operates. It takes a while to get there, but it is possible for ANY organization to accomplish this.

One of the more basic outcomes is setting team agreement on where your organization currently stands. Without that agreed upon score, everyone holds a different idea of where the organization is, or how well it is doing. Agreed upon scores that are endorsed by leadership



establish a current-state position for the entire organization. From there, you can begin to improve. Without agreement improvement can be chaotic if improvement happens at all.

Effective goal setting is an important outcome to this process as well, and setting a two-year rolling creates the culture of incremental improvement. Just as you improve in each of the sections of this assessment, work to improve at setting goals. Gauge your organization's ability to handle projects as well as leadership's ability to set effective goals that make good progress toward your ideal state.

The term *mastery* is used in a lot of different contexts. In terms of this process, think about your organization's effort to be the absolute best it can be. An organization truly on the path toward mastery is one that understands it will never actually reach the perfect-state, but it is also an organization that never stops trying to reach that perfect state despite the understanding that it will never get there. You can always be better. You can always improve. Some of the first projects you pick will likely have a more profound impact than the project you pick ten years from now, after you've completed the most needed or critical projects -- the "low-hanging fruit," if you will. The most critical project is instilling a culture that always gets better. Facilitating that is the most critical outcome of the self assessment process.

Supporting Documents



Listed below are all of the statements of our Digital Marketing Self Assessment. Give this list to your team members who are participating, and have them score the organization on the following scale:

1 - Way Behind

2 - Somewhat Behind



3 - Average

4 - Somewhat Ahead

5 - Well Ahead

6 - Dominant

A score of "0" means that the assessment taker does not know, or that the statement is not applicable to their area of focus. The "0" should not be counted in calculating team average scores.

1) Digital Marketing Fundamentals and Humalogy (DMFH)

DMFH 1: Leadership and Vision

- 1.) We have a defined set of Digital Marketing plans, practices and expectations that our leadership regularly reviews to ensure we're making progress against our objectives.
- 2.) Our leaders walk the talk by learning to use new tools themselves, considering digital in their strategic planning and backing digital efforts with funding.
- 3.) Our leadership recognizes our digital capabilities as being critical to the future success of our company.
- 4.) We have people with the right Digital Marketing skills to help us take the lead with our efforts.
- 5.) We have a written Digital Marketing strategy that establishes plans for at least a year out, and is known throughout the organization.

DMFH 2: Culture and Team

- 6.) As an organization we embrace digital tools to extend our capabilities and expand our market.
- 7.) We use a variety of digital tools to collaborate and communicate internally across our organization.



8.) Our teams apply new Digital Marketing concepts and tools rapidly and appropriately.

9.) Our Digital Marketing effort is being led by the right team of people and their skills are regularly updated.

10.) We have people on the team responsible for content design who are very skilled at it and create excellent content.

11.) We have staff who are excellent at handling data and analysis associated with our Digital Marketing efforts.

12.) The contractors and vendors we use are highly skilled in Digital Marketing and always perform their assignments with excellence, on time and within budget.

DMFH 3: Process

13.) We have representation from a cross-functional team that oversees and follows an established process to help develop Digital Marketing strategy, set priorities, and review progress.

14.) Marketing and IT are aligned on the requirements to do Digital Marketing well and have robust processes in place to execute Digital Marketing effectively.

15.) Our Digital Marketing process (from conception through execution) ensures repeatable success.

16.) We have a rollout process for launching new digital tools that communicates the functionality and capabilities being delivered.

DMFH 4: Web (Humalogy)

17.) Information about prospects that comes in from the website is shared with our sales team.

18.) Customers, prospects and partners ("constituents") can actively kick off business processes, or make requests that are routed to the appropriate parties via the website.

19.) Activities that are kicked off from the web are fed into and updated in our CRM



system.

20.) We have the ability to transact business without human involvement via the website.

DMFH 5: Social (Humalogy)

21.) We have a defined set of social tools that we use and we are well trained in leveraging them.

22.) Our constituents' are able to identify their preferences about what information is important to them so that we only deliver information that is critical to them.

23.) Our social engagement practices include identifying talent that we may want to hire and engaging them in online conversation.

24.) Our people are aware of their personal online reputation and proactively manage it.

DMFH 6: Mobile (Humalogy)

25.) Our mobile tools are an extension of our workforce: at appropriate times constituents are able to access information that eliminates the need for a person-to-person engagement.

26.) Our workforce would say that their mobile device is an extension of the office and provides them access to critical information at the point of need.

27.) Users are able to take action through our mobile tools (when they normally would have to wait) thereby increasing productivity, efficiency and convenience.

28.) When interacting with us, our constituents can switch between devices seamlessly to access accurate, timely information and complete tasks.

2) Content and Connection (CON)

CON 1: Web

1.) Our website is structured in a way that enables us to determine what visitors might need and provide them quick access to information they value.



5) Digital Marketing Measurements and Analytics (DMMA)

DMMA 1: Web

- 1.) We have clearly established goals and use dashboard reports to continuously monitor website performance and other important related metrics.
- 2.) We regularly compare our website ranking statistics against those of our competitors.
- 3.) We regularly evaluate click-through (and other relevant) measures and test to find the most effective tactics.
- 4.) We track and monitor how people connect with us via the web and make regular adjustments based on what we learn.
- 5.) We have a defined set of measurement processes, tools, and analytics that we regularly use to track performance.

DMMA 2: Social

- 6.) Our company uses social tools to monitor the brand and actively engages in one-on-one conversations to properly manage the online reputation.
- 7.) We use a variety of measures (e.g., sentiment, experiential, and engagement analysis) to evaluate the effectiveness of our social engagement tactics.
- 8.) We regularly report on the insights we uncover based on the analysis of the data we collect socially.
- 9.) As part of our hiring practices, we consider the social connectedness of prospective new hires.

DMMA 3: Mobile

- 10.) We have been successful using mobile enabled tools to improve productivity and lower costs.
- 11.) We track downloads and actively monitor feedback on the usability of our mobile assets.



12.) We are constantly monitoring constituent feedback on our mobile applications to improve the overall functionality they provide.

